

Professional Development Planning using



"Registrant" *Training Guide* February 2006





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Training server: <https://testPDtrack.kyvae.org>

Production server: <https://PDtrack.kyvae.org>



Introduction - What Is PDtrack?

PDtrack is the Kentucky Adult Education (KYAE) web-based system that provides a database-driven catalog of educational opportunities and allows for both the registration and online submission of catalog items. The system allows registrants and their supervisors to find and select catalog items (online or offline events and courses, self-directed study objectives and other items) for analysis against degree or program requirements and to track registrant progress. The system also enables administrators to assess the coverage and capacity of catalog offerings in order to make administrative decisions to improve program offerings and delivery.

PDtrack provides an array of features that allow educational event and course providers, registrants, supervisors, facilitators, and administrators to effectively offer learning opportunities, define individual programs, facilitate program delivery and track progress. An overview of the principal features, grouped by functionality, is presented below.

PD planning

The PD planning features allow registrants to build and submit PD plans to their supervisors for approval each year. Supervisors, in turn, may review and approve or reject submitted PD plans. These processes are fully integrated with the catalog and audit modules to allow quick and easy plan development and assessment by both the registrant and the supervisor.

Catalog

The catalog manages information related to learning opportunities, including: online courses and events; live courses and events; and self-directed offline activities such as journal reading and article writing. Catalog management capabilities allow course and event providers to submit items for review, approval, and subsequent publishing in the catalog. The catalog enables registrants to browse and search for items that are published. Multiple formats of catalog information are provided, including a graphical calendar display. A cart mechanism allows registrants to easily build a portfolio of items that they are considering for advisor approval or enrollment.

PD history

The system's audit module allows users to check their PD history, which is a transcript of all of the professional development activities for a particular individual. The audit module also allows you to check selections against specialty track or academic degree requirements, track registrant progress against those requirements, and perform extensive "what-if" scenarios to evaluate the education options that can be pursued.

Enrollment

Users can enroll for items offered through the catalog, including those delivered online via KYVAE (<http://www.kyvae.org/>). This is accomplished using a variety of

features that include one-step enrollment for multiple opportunities in a registrant's cart.

PDtrack enrollments are performed in "real time" – there is no waiting for those items that are set for immediate enrollment. However, some catalog items may be set so that the facilitator must check on the user's eligibility first; these items will only allow users to enroll in a "pending" status. All information is validated by the system and users are automatically notified of enrollment activity by email.

Item management

PDtrack allows anyone who has an account to submit a catalog item for KYAE approval. The submitter of the item request also indicates who in PDtrack will be serving as the facilitator for that item. The item management features allow the approved PD providers and the event facilitators to access and update enrollment rosters and the related wait lists. These users also manage their particular activities' statuses (e.g., extend the enrollment display dates or cancel an event).

Reports

The reporting features enable program directors to obtain various local center data summaries. In addition, the event facilitators can produce sign-in sheets and completion certificates.

Help and demonstrations

The PDtrack home page has a "help" feature where you will find a User Guide. Click on **Help** from the top navigation bar. In the left side of the help screen you will see that the User Guide is split into topics with step-by-step directions. In addition, there are three short demonstrations that users can view short (these require Macromedia Flash). The demonstrations are:

- **Catalog** – Find out how to browse the catalog, add items to your cart and register.
- **PDPlanning** – Learn how to propose a PD Plan.
- **Audit** – Run an audit on the items in your cart to ensure they satisfy your program requirements.

Pop-up blocker

Before getting started, make sure the pop-up blocker is turned off.

In Microsoft Internet Explorer:

- Go to "Tools" on the menu bar, then "Pop-up Blocker," then "Pop-up Blocker Settings."
- In the box called "Address of Web site to allow," type ***.kyvae.org** then click "Add."
- Click "Close."



Chapter 1 - Getting started

Objectives

- Log in to the system.
- Set your password reminder question.
- Change your password.
- Navigate within the system using the top menu links and side navigation bars.
- Log out of the system.

Activities

You will use the **production server** (<https://PDtrack.kyvae.org/>) for the activities in this chapter. You have been assigned a PDtrack **user name** and **password**, which you will need at this time.

Logging in, Setting the password reminder question, and changing your password

1. In the **Login** box (left sidebar) type in your user name and password, then click on the "Login" button.
2. If this is your first time logging into the system, you will be prompted to set a Password Reminder Question and Answer. **This is NOT your new password.** This is a method of verifying your identity in the event you forget your password. Choose one of the questions in the drop-down box, then type the answer in the box below. Should you ever forget your password in the future, you can click on "Forgotten your password?" from the login screen and use this information to reset your password and to access your account. **You must set the password reminder question and answer before PDtrack will allow you to log in completely.**
3. Now that you have set your password reminder question and answer, notice that your name is now in the left sidebar and a new top menu link has appeared along the top. Can you identify what that new link is?
4. Let's change your password. Click on "Manage Your Account" under the "Logout" button. This will take you to "Your Details." Choose a new password (it must be 4-8 characters in length), then enter it in the box titled "Password." Retype the same password in the box titled "Retype Password." Scroll to the bottom and click "Save Changes."
5. Follow along as we explore some of the different areas of PDtrack.

Top Menu Links

Across the top of the page are the main feature links. Click on a link to open the desired feature.

- **Catalog** – Opens the catalog of PD items where you can browse, search, filter, add items to your cart, and enroll.
- **Calendar** – View and search the catalog by date. Note that the calendar is a subset of the entire catalog since it contains only those catalog items that can be meaningfully displayed in a graphic calendar format.
- **Submit Item** – If you are a PD provider rep, click here to submit a new item to the catalog.
- **My PD Plan** – Manage your past, current and submitted PD Plans.
- **My Cart** – View the items in your cart.
- **Audit** – Launch the Audit module where you can see if your items satisfy program and degree requirements.
- **Reports** – Run reports if you have such privileges.
- **Help** – Open the online User's Guide.

Left Sidebar Boxes

Several boxes on the left sidebar give you another way to access PDtrack features.

- **My Account** – Once you are logged in, you can **Logout** here or **Manage Your Account**.
- **Admin Console** – If you have administrative privileges, click here to access administrative features.
- **PD Planning** – Click the links to either manage your PD Plans or create a new one.
- **Catalog Search** – Search the catalog directly from this box. Type a keyword and indicate in what field the system should look for it.
- **Cart** – Another way to view your cart, the box also tells you the number of items in your cart.

Logout

Now that we've explored a little, let's logout of the production server. Click on "Logout."



Chapter 2 - Browsing the catalog

Objectives

- Browse and search the catalog.
- Browse the calendar.
- Enroll in items using the cart.
- Join a wait list.

Activities

You will use the **training server** (<https://testPDtrack.kyvae.org/>) for the activities in this chapter. You have been assigned a PDtrack training session **user name** and **password** (this should be highlighted on page 14). **This account will be used for the activities in Chapters 2 and 3 only.**

Note: Users may view the catalog and add items to their cart without being logged in.

Add an item to your cart.

- Select the **Cart** check box (rightmost column) for the item you want to add. Scroll to the bottom of the page and click **Update Cart**.

Add another item to your cart.

- Click the **Title** of the item you want to add. The item's **Item Detail** page will appear. Scroll to the bottom and click **Add to Cart**.

View your Cart.

- In the **Cart** box (left sidebar) click **View Cart**.

Join a Wait List.

- In the catalog, find an item that is **Full**. If any specific information is required to assist you in finding an item that is Full, your trainer will provide it. Add yourself to the item's **Wait List** by clicking **[Full - join wait list]** below the item.

Normally, you would scroll to the bottom of the **Cart Details** page and click **Begin Checkout**. However, let's wait and do this later – after you've submitted your PD Plan.

NOTE: Do **NOT** logout. We will continue in the training server for Chapter 3.



Chapter 3 - Professional development planning

Objectives

- Identify the statuses of a PD plan.
- Create an Individual Professional Development Plan (IPDP).
- Start a plan using items already in your cart.
- Start a plan based on a previous one.
- View your PD plans and add/view comments.
- Complete the cart checkout process.
- Commit to an approved PD plan.

Activities

You will use the **training server** (<https://testPDtrack.kyvae.org/>) for the activities in this chapter. You have been assigned a PDtrack training session **user name** and **password** (this should be highlighted on page 14). **This account will be used for the activities in Chapters 2 and 3 only.**

Identify the statuses of a PD plan:

- **Unfinished** – A PD plan is shown as “Unfinished” when you save the plan for editing at a later time. You can make changes to a plan that is “Unfinished.” (This allows you to work on your plan several times before you submit the final version to your supervisor.)
- **Submitted** – A PD plan is shown as “Submitted” once you click “Submit” in your plan. You cannot make changes to a plan once you click “Submit.”
- **Rejected** – A PD plan is shown as “Rejected” if your supervisor rejects it.
- **Approved** – A PD plan is shown as “Approved” if your supervisor approves it.
- **Active** – A PD plan is shown as “Active” once you commit to an approved plan. You can have only one active plan; this is the plan that is “in force.”
- **Inactive** – A PD plan is shown as “Inactive” when a new plan has been approved by your supervisor and you have committed to that new plan.

Create a PD plan from scratch:

- In the **PD Planning** box (left sidebar) click **Create New PD Plan**.
- Select the appropriate **Program Year**.
- The ePortfolio URL is a forthcoming feature. You can disregard this at this time.
- Explain your goals for your professional development in the text box titled “**My Goals**.” See page 12 for a discussion of **SMART goals**.
- Add items to your plan by clicking **Add Items to Plan** and selecting items from the catalog that opens in a pop-up window. When you are finished selecting items to add to your plan click **Add to Plan**. This will close the pop-up window.

- For **every** item you added, you must complete the **Activity Details**. First, you must select a **Proposed Start Date** and a **Proposed End Date** using the pop-up calendars. Next, you must complete the text box titled "**How does this activity align to your program goals?**" You should explain how the selected activity helps you meet the goals you outlined under "**My Goals.**"
- Click **Submit Plan**, but only when you are ready for the plan to be submitted for review by your supervisor.

While logged in as a user, create and submit another PD plan using items in your cart.

- Start by adding items to your cart and then, from your cart click **Propose Plan**.

While logged in as a user, create and submit a third PD plan based on one of the two plans you have already submitted.

- Start by clicking **My PD Plan** in the **PD Planning** box (left sidebar) and opening any existing plan. Click **Save as New Plan** before making any desired changes and submitting the plan.

Add and view comments.

- While logged in as a user, add a **Comment** to one or more of your plans.
- View comments for one or more of your plans.

Complete the checkout process from the cart.

- Click on **My Cart** from the top navigational bar.
- Scroll to bottom and click "**Begin Checkout.**" This will take you to "Checkout Step 1," which is where you can enter promotional codes. Promotional codes are like "coupons" for PD events, but since you are employed by a KYAE-funded program, you will not need any promotional codes.
- Scroll to the bottom and click "**Next.**" This will take you to "Checkout Step 2," which is for billing details. You should get this message:
There is no cost for the items in your cart. Please click "Next" to register in your selected items.
- Scroll to the bottom and click "**Next.**" This will take you to "Checkout Step 3," which is the final step in the checkout process. This gives you a "receipt" that you can print for your records. It lists all items in which you have enrolled.

Commit to your PD plan and then checkout plan.

- Once your supervisor has approved your submitted PD plan, you must "**Commit.**" You should review your approved PD plan for changes and comments from your supervisor. If you are satisfied with your approved PD plan, scroll to the bottom and click "**Commit.**" This changes your plan's status to "Active." Now you can enroll in all the items in your active plan. Access the active plan, then scroll to the bottom and click "**Checkout Plan.**"



Chapter 4 - PD history and audit

Objectives

- Access the audit module.
- Identify and use the toolbar functions.
- Find a specific specialty track or academic degree and use the audit report.
- View your PD history.

Activities

You will use the **production server** (<https://PDtrack.kyvae.org/>) for the activities in this chapter. You have been assigned a PDtrack **user name** and **password**, which you will need at this time.

1. Click on **Audit** in the top menu from PDtrack.
2. Scroll your mouse over the **Search** option (top left of tool bar) and select **Search Specialty Track**.
3. Leave the **Keyword** field blank and click on the **Search** button to see all the different specialty tracks or degrees.
4. Select a specialty track and see if your PD history has any matches with that specialty track.
5. While still viewing the specialty track, click the link which reads **Visualize Specialty Track or Degree Description** located next to the **Specialty Track** drop-down list.
6. The red "island" represents the requirement for the specialty track. Any items which can be applied against this requirement are displayed on the red island as colored ovals.
7. Any items you have selected are listed on the left hand side of the browser, under the bubble heading which reads **Select**. The legend on the left side of the screen explains the color coding of items that are current, selected and taken.
8. The pie chart in the middle of the screen displays the total items required for the specialty track, as well as the total requirements to be completed.

The Help feature offers more information.



Appendix: PDtrack user role information

As a PDtrack user, you will likely identify with one or more of the following user roles:

- **Registrant** — Registrants can engage in PD activity: browse the catalog for items, build and submit PD plans, and run audits. **Known Registrants** have an active AERIN account and can enroll in catalog items at preferred pricing (generally no fee), and can propose annual PD plans. **Unknown Registrants** do not have an active AERIN account and can enroll in items by paying a standard fee.
- **Supervisor** — Supervisors can access all Known Registrant functions and approve Known Registrant PD plans at their location code. They can also manage Known Registrants' statuses for self-directed activities.
- **PD Provider Rep** — PD Provider Reps are authorized by a provider to submit items for inclusion in the catalog (subject to the required approvals). The item may be local or statewide in accordance with the provider. PD Provider Reps can also manage items' statuses (open for registration, full, cancelled, closed).
- **Facilitator** — Facilitators are the people who deliver items. They can access Registrant functions and manage rosters for items (updating the status of registrants).
- **Administrator** — Administrators are assigned specific administrative roles to manage all facets of the system. The roles are predefined using a configurable set of system access privileges, and can be changed by appropriate administrators at any time. Specific management functions include:
 - Review and approval of new items for inclusion in the catalog
 - Item creation and maintenance
 - System configuration



Appendix: Glossary of key terms

Term	Definition
AERIN	The database of record for KYAE provider employees, it is used to create and manage user account information for known users in PDtrack. AERIN is also used to enable progress tracking of these users toward their professional development goals.
Calendar	A date-based graphical display of catalog items that have been configured to appear on the calendar.
Cart	A temporary user-selected bundle of catalog items being considered for approval submission and/or enrollment and purchase.
Catalog	Central repository of all learning and professional development opportunities. Each unique learning opportunity is referred to as a catalog item. Item types include: off-line event; online event; online course; self-directed activity (reading, writing, etc.).
eRMA	A system that enables the delivery of online catalog items to Registrants through real-time integrations with several courseware management systems available via KYVAE (http://www.kyvae.org/).
Event	Any catalog item that is delivered at a specified time. These types of catalog items may be displayed in a graphical calendar view.
Item	A specific learning opportunity within the catalog.
PD	Professional Development
PDU	Professional Development Unit
Provider	The organization managing the offering of a catalog item.
SDA	Self-Directed Activity



Appendix: Goal setting

What makes a good goal?

Goal-setting wisdom has taught us a good goal must be written down and **SMART**:

- **Specific**
- **Measurable**
- **Attainable**
- **Results-oriented**
- **Time-bound**

Example of a SMART Goal:

"As a result of using small group instruction, the percentage of learners in my class will persist long enough to improve their reading scores by two levels this year."

- **Specific** — an increase in the number of learners who will continue coming to class long enough so they will improve their reading skills by two levels;
- **Measurable** — improve reading skills by two levels;
- **Attainable** — presumably possible to achieve;
- **Results-oriented** — specific results are stated;
- **Time-bound** — by this year's separation date of June 30.

Is this a SMART goal?

Think about what this writer is accomplishing and what is left out with the following statement:

"I want to take TABE training."

Why is this not a SMART goal?

**This page was
intentionally
left blank.**



Appendix: Training accounts

Use these accounts in order to access the of PDtrack training server.

NOTE: All user names are case-sensitive and use **train** as the password.

Registrant user names	Supervisor user names	PD Advisor user names
TTRegistrant21	TTSupervisor1	TTPDA1
TTRegistrant20	TTSupervisor1	TTPDA1
TTRegistrant19	TTSupervisor2	TTPDA2
TTRegistrant18	TTSupervisor2	TTPDA2
TTRegistrant17	TTSupervisor3	TTPDA3
TTRegistrant16	TTSupervisor3	TTPDA3
TTRegistrant15	TTSupervisor4	TTPDA4
TTRegistrant14	TTSupervisor4	TTPDA4
TTRegistrant13	TTSupervisor5	TTPDA5
TTRegistrant12	TTSupervisor5	TTPDA5
TTRegistrant11	TTSupervisor6	TTPDA6
TTRegistrant10	TTSupervisor6	TTPDA6
TTRegistrant9	TTSupervisor7	TTPDA7
TTRegistrant8	TTSupervisor7	TTPDA7
TTRegistrant7	TTSupervisor8	TTPDA8
TTRegistrant6	TTSupervisor8	TTPDA8
TTRegistrant5	TTSupervisor9	TTPDA9
TTRegistrant4	TTSupervisor9	TTPDA9
TTRegistrant3	TTSupervisor10	TTPDA10
TTRegistrant2	TTSupervisor10	TTPDA10
TTRegistrant1	TTSupervisor11	TTPDA11
TTRegistrant22	TTSupervisor11	TTPDA11
TTRegistrant23	TTSupervisor12	TTPDA12
TTRegistrant24	TTSupervisor12	TTPDA12
TTRegistrant25	TTSupervisor13	TTPDA13
TTRegistrant26	TTSupervisor13	TTPDA13
TTRegistrant27	TTSupervisor14	TTPDA14
TTRegistrant28	TTSupervisor14	TTPDA14
TTRegistrant29	TTSupervisor15	TTPDA15
TTRegistrant30	TTSupervisor15	TTPDA15